



Travel Tips and Tricks #5: Cancelling Reservations and Requests

September 2020 (revised April 2021)

Overview: How to Cancel Reservations and Requests

When travel plans change, they often result in reservation and request cancellations. The cancellation process in DTM is a two-step process requiring action in the travel module for reservations as well as in the request module for the document.

Step 1 cancels the reservations and travel segments.

Step 2 cancels the request document and finalizes the action.

Noteworthy Information:

- Canceling the request alone does not cancel travel reservations (i.e. hotel, rental car, airfare)
- When in doubt, call DTM Support 844-308-6880; press option #2

Bonus:

- At the end of the document, there are steps on how to close and inactivate requests to help avoid cluttering your requests

Scenario: I no longer need to go on TDY but my Request and Reservations are still active in DTM. What are the proper steps to cancel my reservations and request?



Defense Travel Modernization Prototype

Step 1: Cancel Reservations

1. Navigate to the Travel module by clicking “Travel” on the header menu bar.

The screenshot shows the SAP Concur Travel module header. The 'Travel' tab is highlighted in the top navigation bar. Below the header, there are several cards: 'Start a Request', 'Start a Report', 'Upload Receipts', '08 Authorization Requests', '55 Available Expenses', and '14 Open Reports'. The user's name 'Hello, William' is displayed. Below the header, there are sections for 'TRIP SEARCH' and 'ALERTS'. The 'TRIP SEARCH' section includes a dropdown for 'Select Type of Travel' and a 'START HERE' button. The 'ALERTS' section contains a message about a free Triplt Pro subscription.

2. Under “Upcoming Trips,” locate the trip you would like to cancel, and then click the “Cancel Trip” hyperlink under “Actions.”

The screenshot shows the SAP Concur Travel module with the 'Upcoming Trips' section selected. The 'Travel' tab is highlighted in the top navigation bar. Below the header, there are sections for 'TRIP SEARCH' and 'Travel Alerts'. The 'Travel Alerts' section contains a message about a free Triplt Pro subscription. Below this, there is a table of upcoming trips. The table has columns for 'Trip Name/Description', 'Status', 'Start Date', 'End Date', and 'Action'. The trip 'Trip from Washington to Burlington (UOSINR) (43JYD)' is highlighted, and the 'Cancel Trip' link in the 'Action' column is also highlighted.

| Trip Name/Description | Status | Start Date | End Date | Action |
|---|--------------------------------|------------|------------|--|
| TDY LAX (TSTTFK) (43JJU) | Withdrawn | 09/20/2020 | 09/22/2020 | |
| TDY LAX 2 (TEFNDR) (43JK7) Conference | Needs Expense Report Withdrawn | 09/27/2020 | 09/30/2020 | Cancel Trip Expense Trip |
| Trip from Washington to Tokyo (CTUZIN) (43JMH) | Needs Expense Report Withdrawn | 10/04/2020 | 10/06/2020 | Cancel Trip Expense Trip |
| OCONUS PER DIEM TEST (ZULWLG) (43JMJ) | Needs Expense Report Withdrawn | 10/08/2020 | 10/12/2020 | Cancel Trip Expense Trip |
| Trip from Washington to Burlington (UOSINR) (43JYD) | Ticketed | 11/23/2020 | 11/26/2020 | Cancel Trip Expense Trip |



3. A new window opens with a "Cancel Trip" pop-up. If you would like to add comments for canceling the trip, add them to the text field then click "OK." Comments are not required.

Request Details - Google Chrome

usg.concursolutions.com/request_view.asp?transactionid=gWvGqRqAHK6p8819nbNU9B4k&type=1&tripID=gWilm...

Request Details

Request Details

Item Name:

Trip Description

Meeting Name

Submitted By:

Submitted on:

Last Ticket Date:

Check here for tickets approval if your itinerary

Approval Status/History

History/Notes:

Cancel Trip

WARNING: You are about to withdraw your request. If you do this, all reservations (including flight, hotel, rental car, and rail) will be cancelled.

If you cancel a trip on the day of the planned trip and have hotel reservations that have been guaranteed for late arrival, you must call the hotel directly or risk paying a no-show charge. Concur cannot cancel hotel reservations made when you contacted the hotel directly.

If you have any questions, please contact your travel agent.

If you are SURE that you want to withdraw this request then please click OK. Otherwise, click CANCEL.

If you have any comments you would like to add (for reporting only), please type them below and click OK.

My TDY was cancelled - travel not needed

Cancel OK

William B

11, 2020 at

ded on

No rules were broken.

The Itinerary has still been reserved. The travel approver must approve the trip, or the traveler must withdraw the trip request to cancel the reservation and avoid hotel no-show fees.

Approved on 2020 September 11, Friday at 03:30 pm Greenwich Mean Time Time by:

4. If your reservations included a hotel, you may see a popup to review the rate rules and restrictions. Scroll down, select the check box agreeing to the rules and restrictions then click continue.

Rules and cancellation policy

Doubletree Hotel Burlington & Conf Ctr

Please review the rate rules and restrictions before continuing.

Important information:

RATE: USD 88.40
TOTAL RATE: 296.22 USD
EXTRA PERSON: 10.00 USD - Extra adult charge

24 HOUR CXL
VISA (VS)
MASTERCARD (MC)
MASTERCARD (CA)
MASTERCARD (IK)
VISA (VI)
AMERICAN EXPRESS (AX)
DINERS CLUB CARD (DC)
DISCOVER CARD (DS)
JCB CREDIT CARD (JC)
CREDIT CARD AX CU DC DS JC VS MC CB ER
DREAM AWAY
1 KING BED COMP WIFI - KEURIG - MINI FRIDGE 50 INCH HD TV - SWEET DREAMS EXPERIENCE BED SAVE 15 PERCENT OFF. EARLY CHECK IN AND CHECK OUT WHEN AVAILABLE. 88.40 PER NIGHT STARTING 23NOV
265.20 TOTAL FOR 23NOV THROUGH 26NOV
0.00 USD - Rollaway bed
0.00 USD - Cribs

Rules and cancellation policy

Important information:

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265.20 TOTAL FOR 23NOV THROUGH 26NOV
0.00 USD - Rollaway bed
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☒ I agree to the hotel's rate rules, restrictions, and/or cancellation policy.

Continue Cancel



5. The next screen lands on the Request linked to the travel reservations just canceled. Click “Request Details” then “Travel Itinerary Details” to confirm the reservations or travel segments have been canceled.

Manage Requests

Trip from Washington to Burlington \$1,124.90

Approved | Request ID: 43JYD

[Request Details](#) [Print/Share](#) [Attachments](#)

Request

- Request Header
- Request Timeline
- Audit Trail
- Linked Add-ons**
- Travel Itinerary details
- View request

| | Details | Date | Amount | Requested |
|---------------------------------|--|------------|----------|-----------------------|
| | | 11/26/2020 | \$35.00 | \$35.00 Allocated |
| | | 11/26/2020 | \$20.00 | \$20.00 Allocated |
| M and IE Allowance. | South Burlington, Vermont | 11/26/2020 | \$248.50 | \$248.50 Allocated |
| Air Ticket (Self Booked) | Washington (IAD) - Washington (DCA) : Multi City | 11/23/2020 | \$556.20 | \$556.20 Allocated |
| Hotel Reservation (Self Booked) | Burlington, Vermont | 11/23/2020 | \$265.20 | \$265.20 Allocated |
| Estimated Total: | | | | \$1,124.90 |

6. When the reservations or travel segments are canceled, you will see the message below. Next step is to cancel the document.

Travel Itinerary - Google Chrome

usg.concursolutions.com/travelwizard/twltinView.asp?sid=gWiilmNNRS\$px5g5bN3RV2lOK2Tbyjwb&isTR=y&...

Travel Itinerary

There are no segments in your itinerary (record locator: UOSINR).
Reservation systems only store itineraries for a short period of time after the trip has ended, however, we store historical information in our reporting tables.
[View trip summary report](#)

Close



Step 2: Cancel Requests

1. In the request document, select the “More Actions” button then click “Cancel Request.”

Manage Requests

Trip from Washington to Burlington \$1,124.90

Approved | Request ID: 43JYD

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

| Expense type | Details | Date ▼ | Amount | Requested |
|---------------------------------|--|------------|----------|--------------------------------------|
| Airline Fees | | 11/26/2020 | \$35.00 | \$35.00 <small>Allocated</small> |
| Public Transportation | | 11/26/2020 | \$20.00 | \$20.00 <small>Allocated</small> |
| M and IE Allowance. | South Burlington, Vermont | 11/26/2020 | \$248.50 | \$248.50 <small>Allocated</small> |
| Air Ticket (Self Booked) | Washington (IAD) - Washington (DCA) : Multi City | 11/23/2020 | \$556.20 | \$556.20 <small>Allocated</small> |
| Hotel Reservation (Self Booked) | Burlington, Vermont | 11/23/2020 | \$265.20 | \$265.20 <small>Allocated</small> |
| | | | | Estimated Total: \$1,124.90 |

More Actions ▼ **Create Expense Report**

- Recall
- Cancel Request**
- Copy Request
- Close/Inactivate Request

2. Confirm canceling the request document by clicking “Yes” in the popup.

Confirm

Are you sure you want to cancel this request?

No **Yes**

3. Confirm the status of the document is updated to “Cancelled”

Manage Requests

Trip from Washington to Burlington \$1,124.90

Cancelled Request ID: 43JYD

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

| Expense type | Details | Date ▼ | Amount | Requested |
|---------------------------------|---|------------|----------|--------------------------------------|
| Airline Fees | | 11/26/2020 | \$35.00 | \$35.00 <small>Allocated</small> |
| Public Transportation | | 11/26/2020 | \$20.00 | \$20.00 <small>Allocated</small> |
| M and IE Allowance. | South Burlington, Vermont | 11/26/2020 | \$248.50 | \$248.50 <small>Allocated</small> |
| Air Ticket (Self Booked) | Washington, District of Columbia - Washington, District of Columbia | 11/23/2020 | \$556.20 | \$556.20 <small>Allocated</small> |
| Hotel Reservation (Self Booked) | Burlington, Vermont | 11/23/2020 | \$265.20 | \$265.20 <small>Allocated</small> |

More Actions ▼ **Create Expense Report**

Congratulations! You have learned the two-step process to canceling reservations and requests in DTM!



Bonus: Close and Inactivate Requests

NOTE: Travelers should use Close and Inactivate on previously approved requests when no further action (i.e. expense report) is necessary. This prevents documents from accumulating or cluttering the request module.

1. Open the document you would like to close/inactivate – the document must have an approval stamp.

SAP Concur | Requests | Travel | Expense | App Center | Support | Help | Profile

Manage Requests

TDY LAX \$996.92
Approved | Request ID: 43JJU

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

| Expense type | Details | Date | Amount | Requested |
|---------------------------------|---|------------|----------|-----------------------|
| M and IE Allowance. | Los Angeles Intl (Airport - LAX), Los Angeles, California | 09/22/2020 | \$165.00 | \$165.00 Allocated |
| POV Mileage | | 09/22/2020 | \$34.50 | \$34.50 Allocated |
| Air Ticket (Self Booked) | Washington, District of Columbia - Washington, District of Columbia | 09/20/2020 | \$382.68 | \$382.68 Allocated |
| Car Rental (Self Booked) | Los Angeles, California - Los Angeles, California | 09/20/2020 | \$88.94 | \$88.94 Allocated |
| Hotel Reservation (Self Booked) | El Segundo, California | 09/20/2020 | \$325.80 | \$325.80 Allocated |

2. Select the “More Actions” drop down, then click “Close/Inactivate Request.”

SAP Concur | Requests | Travel | Expense | App Center | Support | Help | Profile

Manage Requests

TDY LAX \$996.92
Approved | Request ID: 43JJU

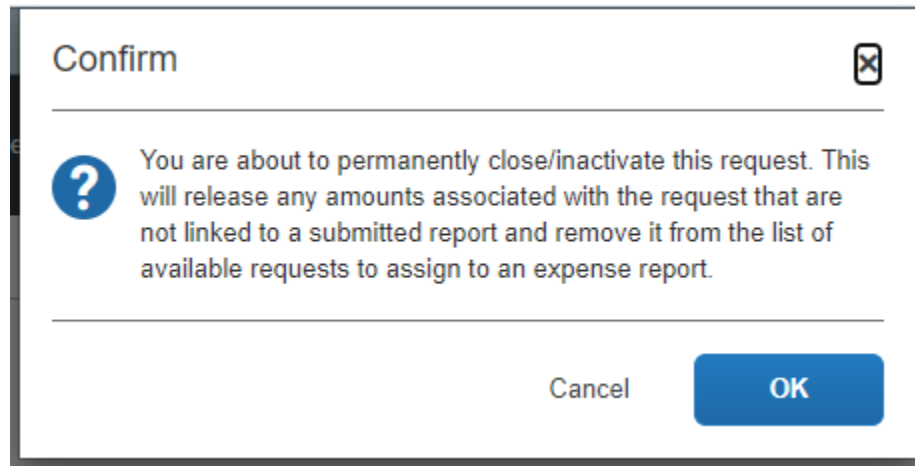
Request Details | Print/Share | Attachments

EXPECTED EXPENSES

| Expense type | Details | Date | Amount | Requested |
|---------------------------------|---|------------|----------|-----------------------|
| M and IE Allowance. | Los Angeles Intl (Airport - LAX), Los Angeles, California | 09/22/2020 | \$165.00 | \$165.00 Allocated |
| POV Mileage | | 09/22/2020 | \$34.50 | \$34.50 Allocated |
| Air Ticket (Self Booked) | Washington, District of Columbia - Washington, District of Columbia | 09/20/2020 | \$382.68 | \$382.68 Allocated |
| Car Rental (Self Booked) | Los Angeles, California - Los Angeles, California | 09/20/2020 | \$88.94 | \$88.94 Allocated |
| Hotel Reservation (Self Booked) | El Segundo, California | 09/20/2020 | \$325.80 | \$325.80 Allocated |



3. A confirmation pop up will appear. Select “OK” if you are sure you want to close/inactivate the request.



4. Navigate to your Requests then click the drop down next to “View” and select “Closed.” Confirm the request you just closed/inactivated is here.

| Request Name | Status | Request Dates | Requested | Approved |
|---|-----------|-------------------------|------------|------------|
| Trip from Washington to Burlington ID: 43JYD | Cancelled | 11/23/2020 - 11/26/2020 | \$1,124.90 | \$1,124.90 |
| Trip from Washington to Tokyo ID: 43JMH | Cancelled | 10/04/2020 - 10/06/2020 | \$825.98 | \$825.98 |
| TDY LAX ID: 43JJU | Approved | 09/20/2020 - 09/22/2020 | \$996.92 | \$996.92 |
| Trip from Washington to San Diego | Cancelled | 09/14/2020 - 09/14/2020 | \$4,074.70 | \$4,074.70 |

Congratulations! You have learned how to Close/Inactivate Requests that do not need any further action.